

FINANCIAL ADVISOR

FA

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Here's Looking At You, Retirement

Like certain movie lines, some people's retirements will be improvised.

Is AI Cool For Wealth Management?

Advisors figure out how to make friends with machines.

A Lurking Threat

Will your custodian leave you on the hook for cybercrimes?

'Knock Yourselves Out'

What if we told pre-retirees to go ahead and spend instead of save?



FA's RIA Survey & Ranking 2023

FA's 2023 RIA RANKING

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION							
310	Delta Financial Group	Basking Ridge, N.J.	996.31	-7.43%	1.34	-12.27%	5.52%
311	Destiny Wealth Partners	Tavares, Fla.	986.97	-4.29%	1.04	-9.81%	6.13%
312	Wedmont Private Capital	West Chester, Pa.	984.07	96.29%	4.58	18.69%	65.38%
313	BFSG	Irvine, Calif.	976.97	-11.56%	1.24	-16.49%	5.91%
314	Agili	Richmond, Va.	972.54	-8.81%	2.79	-15.87%	8.39%
315	CJM Wealth Advisers	Falls Church, Va.	970.25	-12.21%	1.14	-16.23%	4.80%
316	Virtue Capital Management	Brentwood, Tenn.	941.39	-12.14%	0.12	-25.68%	18.21%
317	Janiczek Wealth Management	Denver, Colo.	940.87	-4.50%	5.53	-10.12%	6.25%
318	Cadinha & Co.	Honolulu, Hawaii	939.35	-10.78%	1.36	-11.43%	0.73%
319	Regatta Capital Group	El Segundo, Calif.	931.43	2.71%	0.93	-4.90%	8.00%
320	Retirement Investment Advisors	Oklahoma City, Okla.	929.85	-17.82%	0.70	-22.85%	6.52%
321	Petersen Hastings Investment Management	Kennewick, Wash.	927.09	-8.36%	0.99	-14.26%	6.87%
322	Delegate Advisors	Chapel Hill, N.C.	902.44	-4.68%	20.99	-13.54%	10.26%
323	Moisand Fitzgerald Tamayo	Orlando, Fla.	901.42	-2.23%	1.13	-10.57%	9.33%
324	NEIRG Wealth Management	North Andover, Mass.	899.33	-12.48%	1.10	-10.24%	-2.50%
325	REDW Wealth	Albuquerque, N.M.	896.40	-6.15%	2.33	5.83%	-11.32%
326	Willis Johnson & Associates	Houston, Texas	894.23	-2.26%	2.17	-11.75%	10.75%
327	Total Wealth Planning	Blue Ash, Ohio	865.82	6.14%	1.55	-14.02%	23.45%
328	MJP Wealth Advisors	Farmington, Conn.	864.38	-10.64%	1.12	-19.63%	11.19%
329	Apriem Advisors	Irvine, Calif.	862.06	-14.47%	1.15	-18.35%	4.75%
330	DiNuzzo Private Wealth	Beaver, Pa.	842.11	-9.40%	1.03	-8.85%	-0.61%
331	Signet Financial Management	Parsippany, N.J.	839.65	-12.49%	1.16	-15.99%	4.17%
332	Halpern Financial †††	Ashburn, Va.	828.83	-3.98%	2.72	-7.45%	3.74%
333	Austin Private Wealth	Austin, Texas	823.11	-3.58%	0.72	-15.25%	13.78%
334	Spectrum Wealth Management	Indianapolis, Ind.	810.00	-17.10%	3.51	-17.10%	0.00%
335	Evermay Wealth Management	Arlington, Va.	799.52	8.51%	1.91	-8.10%	18.08%
336	Lake Street	Chicago, Ill.	796.37	-9.58%	1.47	-12.09%	2.85%
337	Financial Advisory Corporation	Grand Rapids, Mich.	795.72	-6.86%	3.39	-13.20%	7.31%
338	Seasons of Advice Wealth Management	New York, N.Y.	789.28	-16.40%	1.02	-18.67%	2.79%
339	Abound Wealth Management	Franklin, Tenn.	787.15	-0.54%	1.38	-24.48%	31.71%
340	WPWealth	Fort Worth, Texas	779.27	-14.79%	1.93	-18.59%	4.66%
341	Stage Harbor Financial	Needham, Mass.	775.23	-7.03%	2.54	-13.13%	7.02%
342	HCM Wealth Advisors	Cincinnati, Ohio	771.84	-9.85%	1.09	-11.51%	1.87%
343	Glass Jacobson Wealth Advisors	Owings Mills, Md.	770.08	10.97%	1.05	-17.27%	34.12%
344	Yeske Buie	San Francisco, Calif.	767.66	-9.94%	2.89	-11.63%	1.92%
345	Rappaport Reiches Capital Management	Skokie, Ill.	765.00	2.68%	1.96	-14.43%	20.00%
346	Southern Financial Group	Birmingham, Ala.	741.14	-11.49%	0.60	-12.27%	0.90%
347	WorthPointe	San Diego, Calif.	733.35	-10.24%	1.29	-12.77%	2.90%
348	Fermata Advisors	Sonoma, Calif.	733.00	47.78%	0.92	-26.11%	100.00%
349	The Advisory Group of San Francisco	San Francisco, Calif.	730.00	-31.24%	4.53	-31.67%	0.63%
350	Socius Family Office	Fort Lauderdale, Fla.	728.19	-0.75%	4.52	-4.45%	3.87%

*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. †††Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth in Assets 2021-22 and % Growth in Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth in Assets, Assets Per Client and % Growth in Assets Per Client have been revised because of participant error. FA regrets the errors.



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